



America's Finest City

THE CITY OF SAN DIEGO



Assessment Engineer's Report

CAMINO SANTA FE MAINTENANCE ASSESSMENT DISTRICT

Annual Update for Fiscal Year 2010

under the provisions of the

**San Diego Maintenance Assessment District Ordinance
of the San Diego Municipal Code**

and

**Landscaping & Lighting Act of 1972
of the California Streets & Highways Code**

Prepared For

City of San Diego, California

Prepared By

AECOM

7807 Convoy Court, Suite 200
San Diego, CA 92111
(858) 268-8080

May 2009

AECOM

CITY OF SAN DIEGO

Mayor

Jerry Sanders

City Council Members

Sherri Lightner
District 1

Carl DeMaio
District 5

Kevin Faulconer
District 2 (Council President Pro Tem)

Donna Frye
District 6

Todd Gloria
District 3

Marti Emerald
District 7

Anthony Young
District 4

Ben Hueso
District 8 (Council President)

City Attorney

Jan Goldsmith

Chief Operating Officer

Jay Goldstone

City Clerk

Elizabeth Maland

Independent Budget Analyst

Andrea Tevlin

City Engineer

Afshin Oskoui

Assessment Engineer

AECOM USA, Inc.

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Assessment Engineer's Report

Camino Santa Fe

Maintenance Assessment District

Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the CAMINO SANTA FE MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), AECOM USA, INC., as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. _____ ,
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE
_____ DAY OF _____, 2009.

Elizabeth Maland, CITY CLERK
CITY OF SAN DIEGO
STATE OF CALIFORNIA

Executive Summary

Project: Camino Santa Fe
Maintenance Assessment District

Apportionment Method: Equivalent Benefit Unit (EBU)

	FY 2009	FY 2010⁽¹⁾	Maximum⁽²⁾ Authorized
Total Parcels Assessed:	277	277	--
Total Estimated Assessment:	\$237,835	\$0.00	--
Total Number of EBUs:	1,239.88	1,239.88	--
<i>Zone 1</i>	772.67	772.67	--
<i>Zone 2</i>	467.21	467.21	--
Assessment per EBU:⁽³⁾			
<i>Zone 1</i>	\$191.82	\$0.00	\$340.81 ⁽⁴⁾
<i>Zone 2</i>	\$191.82	\$0.00	\$340.81 ⁽⁴⁾

⁽¹⁾ FY 2010 is the City's Fiscal Year 2010, which begins July 1, 2009 and ends June 30, 2010. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

⁽²⁾ Maximum authorized annual amounts subject to cost-indexing provisions as set forth in this Assessment Engineer's Report.

⁽³⁾ Although the Unit Assessment per EBU is the same for Zones 1 and 2, the difference in the Location Factor for each zone results in a tenfold difference in total assessment for equivalent parcels in Zone 1 versus Zone 2.

⁽⁴⁾ Prior fiscal year's maximum authorized annual assessment increased by cost-indexing factor of 6.16%.

Annual Cost-Indexing: The maximum authorized assessment rate has been increased based on the approved annual cost-indexing provisions.

Bonds: No bonds will be issued in connection with this District.

Background

The Camino Santa Fe Maintenance Assessment District (District) is generally located along Camino Santa Fe and future Carroll Canyon Road. The District improvements were installed by the H.G. Fenton Company when the Camino Santa Fe extension was completed between Miramar Road and Mira Mesa Boulevard in 2004. To ensure long-term maintenance of these improvements above City standards, the developer funded the formation of a Maintenance Assessment District.

District Proceedings for Fiscal Year 2010

This District is authorized and administered under the provisions of the “San Diego Maintenance Assessment District Ordinance” (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the “Landscaping and Lighting Act of 1972” (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of “Proposition 218” (being Article XIID of the California Constitution), and provisions of the “Proposition 218 Omnibus Implementation Act” (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as “Assessment Law”). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Assessment Engineer’s Report is to update the District budget and assessments for Fiscal Year 2010. The Fiscal Year 2010 assessments proposed within this Assessment Engineer’s Report are equal to or less than the maximum authorized assessment. Therefore, the vote requirements of Section 4 of Article XIID do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

Bond Declaration

No bonds will be issued in connection with this District.

District Boundary

The District is generally located along Camino Santa Fe and Carroll Canyon Road, bounded by the Mira Mesa Maintenance Assessment District to the north, El Camino Cemetery to the west, Miramar Road to the south, and Carroll Canyon to the east. The District includes those parcels that receive access from the improved stretches of Camino Santa Fe and future Carroll Canyon Road.

The Boundary Map and Assessment Diagram for the District are on file in the Maintenance Assessment Districts section of the Park and Recreation Department of the City of San Diego and by reference are made a part of this report. The Boundary Map and Assessment Diagram for the District are available for public inspection during normal business hours. A reduced copy of the Boundary Map is included as Exhibit A.

Project Description

The project to be funded by the proposed assessments is the maintenance of landscaped and hardscaped improvements and streetscape features including, but not limited to medians, sidewalks, curb and gutter, slopes adjacent to rights-of-way, and brow ditches. Assessment funds may also be used for minor capital improvements consistent with the current apportionment methodology.

Maintenance activities may include but are not limited to irrigation, weed control, litter control, tree trimming, pruning, edging, pest control, fertilizing, other maintenance necessary for plant health and appearance; hardscape and streetscape cleaning; maintenance of irrigation system components; incidental traffic control; and security.

The maintenance areas are generally adjacent to Camino Santa Fe. These areas include landscaped medians, hardscaped medians, landscaped rights-of-way, and slopes adjacent to rights-of-way. The engineering drawings and specifications for the areas to be maintained by the District are on file at the City's Development Services Center Records Counter and are incorporated herein by reference.

Future development is planned that will extend Carroll Canyon Road through the District. Future improvements along Carroll Canyon Road will be included within this District.

The improvements and services provided by the District will be maintained in accordance with specifications and contracts on file with the Park and Recreation Department. These documents are available for public inspection during normal business hours.

Separation of General and Special Benefits

Consistent with City policy for the public at large, the City will provide the District with annual contributions from the Gas Tax Fund for median maintenance (32.20¢ per square foot of landscaped median and 12.84¢ per square foot of hardscaped median). These cost allocations, reviewed and adjusted annually by the City, are considered to be “general benefits” administered by the District. All other maintenance, operations, and administration costs associated with the District, which exceed the City’s contribution to the public at large, are accordingly considered to be “special benefits” funded by the District.

Cost Estimate

Estimated Costs

Estimated Fiscal Year 2010 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

Annual Cost-Indexing

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer’s report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U) plus 3%, as approved by the District property owners in Fiscal Year 2007, allows for minor increases for normal maintenance and operating cost escalation without incurring the

costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Fiscal Year 2007 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U plus 3%. The maximum authorized assessment rates contained within this Assessment Engineer's Report have been indexed in accordance with these cost-indexing provisions.

Method of Apportionment

Estimated Benefit of the Improvements

The improvements maintained by the District are primarily located along the major north-south arterial transportation corridor in the area. The Transportation Element and the Carroll Canyon Master Plan Element of the Mira Mesa Community Plan, and the general policy recommendations found in the City's General Plan establish several goals and guidelines for the planned development of the community. The improvements to be maintained by the District are consistent with these goals.

The major and arterial streets within the District are the backbone of the street network within the community. These streets serve as the primary access routes for inter-community and intra-community trips and thus serve all parcels within the District. All parcels within the District benefit from the enhanced Camino Santa Fe transit corridor through increased community aesthetics and greater public safety.

As indicated on Exhibit A, the District has been divided into two zones for benefit apportionment purposes. The two zones are generally described as follows:

- ◆ **Zone 1** includes that portion of the District immediately adjacent to the recently improved section of Camino Santa Fe as well as those parcels along Miratech Drive and Summers Ridge Road.
- ◆ **Zone 2** includes all of the remaining parcels within the District boundaries.

Apportionment Methodology

The total cost of the maintenance of District improvements will be assessed to the various parcels in the District in proportion to the estimated Equivalent Benefit Units (EBUs) assigned to a parcel in relationship to the total EBUs of all the parcels in the District.

EBUs for each parcel have been determined as a function of three factors – a Land Use Factor, a Benefit Factor and a Location Factor – related as shown in the following equation:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor} \times \text{Location Factor}$$

Each of these factors is discussed below. Parcels determined to receive no benefit from the District improvements have been assigned zero EBUs.

Land Use Factor

Since the proposed District improvements are primarily associated with the Transportation Element of the General and Community Plans, trip generation rates for various land use categories (as previously established by the City's Transportation Planning Section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates address vehicular trips, they are also considered to approximately reflect relative trip generation for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.), and are considered the best available information for these other transportation modes.

Trip generation rates provide the required nexus and basis for assigning relative proportionality of potential benefit to the various land use/zoning classifications (as defined by the City's Municipal Code) within the District. Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors as shown in Table 1.

TABLE 1: Land Use Factors

Land Use/Zoning	Land Use Factor ⁽¹⁾
Commercial – Office & Retail	45.0 per acre
Mining	7.5 per acre
Open Space (designated)	0 per acre
Small Commercial	30.0 per acre
Vacant	0 per acre

⁽¹⁾ Proportional to trip generation rates contained in the City of San Diego *Trip Generation Manual* dated May 2003.

Designated Open Space serves primarily to preserve natural landscape and habitat. While access for study and passive recreation is often permitted, these activities are allowed only to the extent they are consistent with the primary purpose of natural preservation. Since this land is essentially “unused” in the customary terms of land use (which relate to human use and development), the trip generation rate is zero. Therefore, the designated Open Space itself receives no benefit from the District improvements and has been assigned a Land Use Factor of zero.

Benefit Factor

The Land Use Factor described above establishes a proportionality of relative intensity of use (or potential use) for the various parcels of land within the District. It does not address the relationship of this use to the specific improvements to be maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the subcomponents of the benefits of District improvements may include some or all of the following: public safety, view corridors and aesthetics, enhancement of commercial identity, drainage corridors, and recreational potential. The components used for this District are public safety and aesthetics.

As Benefit Factors and their subcomponents are intended to reflect the particular relationships between specific land uses within a district and the specific improvements maintained by the district, Benefit Factors will generally vary from one district to another,

based on the specific character and nature of the applicable land uses and improvements being maintained.

For a given land use, the overall Benefit Factor is equal to the sum of the subcomponent values. If a land use category receives no benefit from a subcomponent, then a value of zero is assigned to that subcomponent. A composite Benefit Factor of 1.0 indicates that full benefit is received. A value less than 1.0 indicates that less than full benefit is received.

The applicable benefit subcomponents and resultant composite Benefit Factors determined for the various Land Use/Zoning categories within this District are as shown in Table 2.

TABLE 2: Benefit Factors by Land Use

Land Use/Zoning	Public Safety (Max. 0.3)	Aesthetics (Max. 0.7)	Benefit Factor (Max. 1.0)
Commercial – Office & Retail	0.3	0.3	0.6
Mining	0.3	0	0.3
Open Space (designated)	0.3	0	0.3
Small Commercial	0.3	0.3	0.6
Vacant	0.3	0	0.3

Public Safety. All land uses are considered to receive the maximum available benefit from the public safety aspect of the District improvements. Public safety is essential to all land uses, and even to lands, such as designated Open Space, held in stewardship with only incidental human use.

Aesthetics. The degree of benefit received from the aesthetic qualities of landscaped and hardscaped roadway medians, rights-of-ways, vegetated sloped, and open space maintained by the District varies among land use categories. Generally, by nature of their use, residential lands receives the greatest benefit from the reduced traffic congestion, reduced noise levels, greater separation from traffic and generally more tranquil environment provided by landscaped and hardscaped roadway medians and rights-of-way. Commercial and institutional uses, on the other hand, often thrive on higher densities, greater traffic access, and a higher level of activity within the vicinity of their enterprises. These uses,

accordingly, receive a lesser degree of benefit from the general insulation and separation provided by the aesthetic elements of District improvements.

Lands in the Open Space, Vacant, and Mining categories are considered to receive no significant benefit from the aesthetic elements of District improvements, as enhanced aesthetic quality of other lands in their vicinity does not affect their function, use, or value.

Location Factor

The Location Factor accounts for the fact that not all parcels within the District receive the same benefit due to the location of the improvements or extent of the services provided. Location Factors may vary between zero (no benefit) and one (full benefit) as shown in Table 3.

TABLE 3: Location Factor by Zone

Land Use/Zoning	Location Factor
Zone 1	1.0
Zone 2	0.1

Zone 1 is established as the base zone and is assigned a Location Factor of 1.0. Zone 2 parcels receive a lesser degree of benefit in proportion to the parcels in Zone 1. Accordingly, Zone 2 has been assigned a Location Factor of 0.1.

Equivalent Benefit Units (EBUs)

As described above, the number of Equivalent Benefit Units (EBUs) assigned to each parcel in the District has been calculated, based on the preceding factors, as follows:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor} \times \text{Location Factor}$$

Based on the above formula, the EBUs calculated for each property, can be found in the Assessment Roll (Exhibit C).

Summary Results

The District Boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBUs and Fiscal Year 2010 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2010 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

AECOM USA, INC.

Eugene F. Shank, PE

C 52792

Carolyn R. Crull

I, _____, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the ____ day of _____, 2009.

Elizabeth Maland, CITY CLERK
CITY OF SAN DIEGO
STATE OF CALIFORNIA

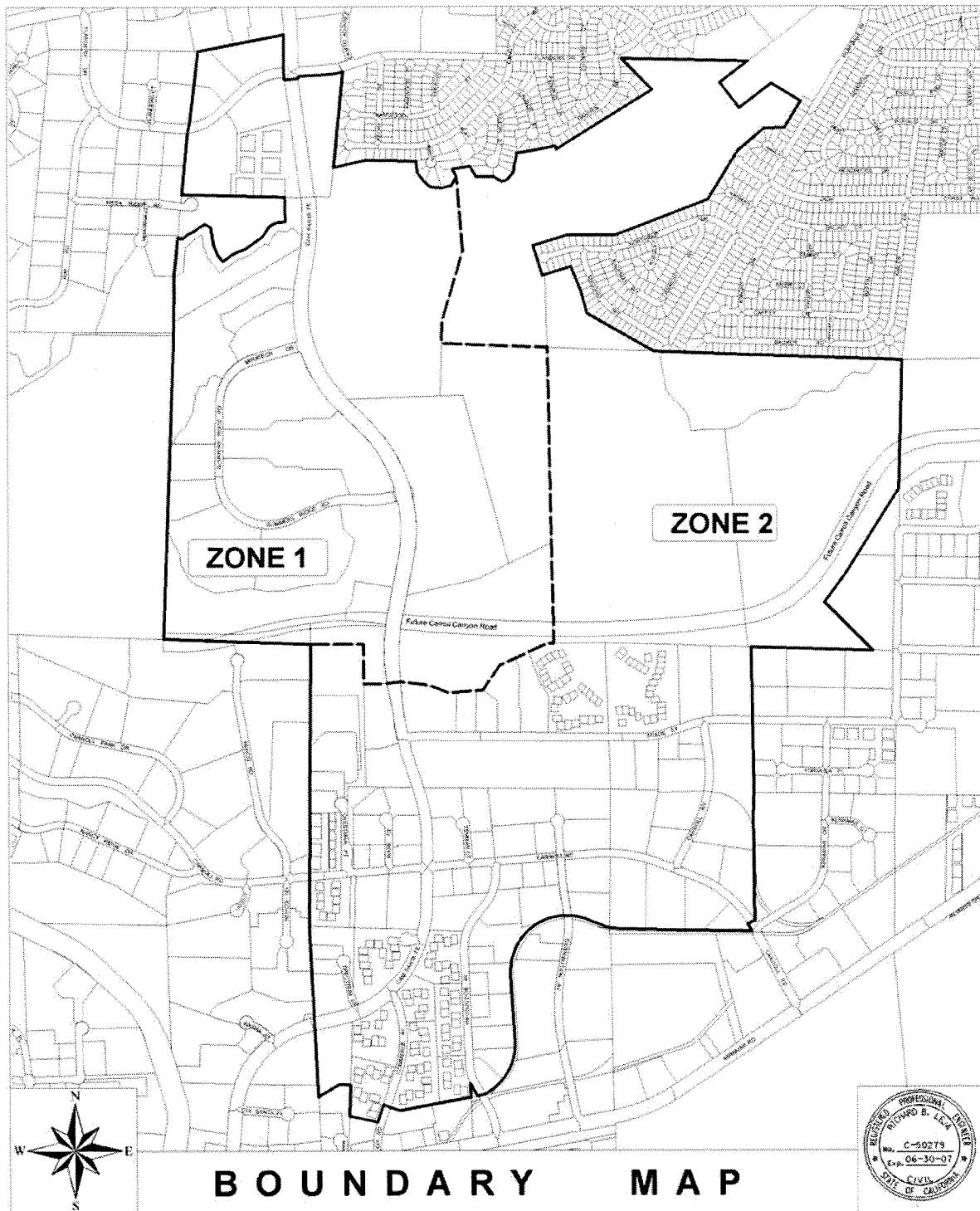
I, _____, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the ____ day of _____, 2009.

Elizabeth Maland, CITY CLERK
CITY OF SAN DIEGO
STATE OF CALIFORNIA

I, _____, as CITY ENGINEER of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the ____ day of _____, 2009.

Afshin Oskoui, CITY ENGINEER
CITY OF SAN DIEGO
STATE OF CALIFORNIA

EXHIBIT A



BOUNDARY MAP

FILED IN THE OFFICE OF THE CITY CLERK OF
THE CITY OF SAN DIEGO, STATE OF CALIFORNIA.
THIS _____ DAY OF _____, 2006.

ELIZABETH MALAND, CITY CLERK
CITY OF SAN DIEGO
STATE OF CALIFORNIA

DESIGNED BY:
ENGINEERING & CAPITAL PROJECTS
1000 Camino del Rio North, Suite 1000, San Diego, CA 92108

I HEREBY CERTIFY THAT THE WITHIN MAP SHOWING
PROPOSED BOUNDARIES OF CAMINO SANTA FE
MAINTENANCE ASSESSMENT DISTRICT, CITY OF SAN
DIEGO, STATE OF CALIFORNIA, WAS APPROVED BY
THE CITY COUNCIL AT A REGULAR MEETING THEREOF,
HELD ON THE _____ DAY OF _____
2006, BY ITS RESOLUTION NO. _____

NOTE:
FOR A DETAILED DESCRIPTION OF THE LINES AND
DIMENSIONS OF LOTS OR PARCELS SHOWN ON
THIS MAP, REFER TO THE COUNTY ASSESSOR'S
MAP WHICH SHALL GOVERN WITH RESPECT TO
ALL DETAILS CONCERNING THE LINES AND
DIMENSIONS OF SUCH LOTS OR PARCELS.

AN ASSESSMENT WAS LEVIED BY THE CITY COUNCIL
OF THE CITY OF SAN DIEGO ON THE LOTS, PIECES,
AND PARCELS OF LAND SHOWN ON THIS
ASSESSMENT DIAGRAM SAID ASSESSMENT WAS
LEVIED ON THE _____ DAY OF _____
2006. SAID ASSESSMENT DIAGRAM AND THE
OFFICE OF THE SUPERINTENDENT OF STREETS OF
THE CITY OF SAN DIEGO, STATE OF CALIFORNIA
ON THE _____ DAY OF _____, 2006.
REFERENCE IS MADE TO THE ASSESSMENT ROLL
RECORDED IN THE OFFICE OF THE SUPERINTENDENT
OF STREETS FOR THE EXACT AMOUNT OF EACH
ASSESSMENT LEVIED AGAINST EACH PARCEL OF
LAND SHOWN ON THIS ASSESSMENT DIAGRAM.

NOTE:
REFER TO THE ENGINEER'S REPORT & REFERENCED
DOCUMENTS FOR EXACT LOCATIONS OF IMPROVEMENTS.

Legend

Future Camino Canyon Rd.
Zone 1
Zone 2



CITY OF
SAN DIEGO

NO.
DATE
REVS.

CAMINO SANTA FE
MAINTENANCE ASSESSMENT DISTRICT

EXHIBIT A

EXHIBIT B

EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

Camino Santa Fe - Fund 70264

	FY 2008 BUDGET	FY 2009 BUDGET	FY 2010 BUDGET
BALANCE FROM PRIOR YEAR	\$ 141,675.00	\$ 419,687	\$ 646,060
REVENUE			
Assessments	\$ 237,834.64	\$ 237,835	\$ -
Interest	\$ -	\$ 6,500	\$ 17,500
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ 12,265.00	\$ 31,682	\$ 31,740
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
TOTAL REVENUE	\$ 250,099.64	\$ 276,017	\$ 49,240
TOTAL BALANCE AND REVENUE	\$ 391,774.64	\$ 695,704	\$ 695,300
EXPENSE			
CAPITAL IMPROVEMENTS PROGRAM	\$ -	\$ -	\$ 189,504
OPERATING EXPENSE			
Personnel	\$ 18,242.00	\$ 14,025	\$ 9,100
Contractual	\$ 143,786.00	\$ 116,509	\$ 62,663
Incidental	\$ 27,917.00	\$ 25,073	\$ 23,973
Utilities	\$ 20,336.00	\$ 21,799	\$ 9,057
TOTAL OPERATING EXPENSE	\$ 210,281.00	\$ 177,406	\$ 104,793
TOTAL EXPENSES	\$ 210,281.00	\$ 177,406	\$ 294,297
RESERVE			
Contingency Reserve	\$ 181,494.00	\$ 518,298	\$ 401,003
TOTAL RESERVE	\$ 181,494.00	\$ 518,298	\$ 401,003
BALANCE	\$ (0.36)	\$ (0)	\$ -
TOTAL EXPENSE, RESERVE AND BALANCE	\$ 391,775.00	\$ 695,704	\$ 505,796

EXHIBIT C

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.